

Adding New Customers

FTD Mercury makes maintaining your customer information easy. Once you have added a customer to your database, FTD Mercury stores the customer's transactions, so you can quickly see the order information, contact information, and credit card details for each of your customers. Maintaining this information also helps you with your marketing strategies. It all starts with adding a customer to your database.

To add a new customer to your FTD Mercury database:

1. On the **File** menu, click **New Customer**. In **Order Entry** or **Point of Sale**, when you enter a name in the **Customer** field, if the customer does not already exist in your database, you are prompted to add the new customer from the **Customer Search** window.
2. In the **Customer Detail Information** window, on the **General** tab, enter the customer's name, address, and phone number.
3. If you plan on faxing statements to this customer, select **Fax** from the **Contact Information** list and enter the customer's fax number. If you want to email statements to the customer or send email delivery confirmations, enter the customer's email address in the **E-mail Address** field.
4. If the customer is tax exempt, select the **Tax Exempt** option and enter the exemption code.
5. If you want to assign a default discount for this customer, enter it in the **Discount Percent** field.
6. From the **Referral Code** list, select the way you obtained the customer.
7. Ensure the **Active Status** option is selected.
8. Select whether you want to send delivery confirmation email messages to the customer, whether you want to include the customer in direct mail or email marketing, and whether you want to protect the customer record from system purges if you run the **Purge Customers** utility.
9. If you have multiple stores, from the **Store of Origin** list, select the store with which the customer is to be associated (the customer can still place orders in all stores).
10. Click other tabs, such as **House Account** and **Marketing**, to configure house account information and marketing categories (if desired). Customers can only charge sales to accounts if you have created a house account for the customer.
11. Click **Save**.



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In Order Entry and Point of Sale, if you enter the name of a customer who is not already in your customer database, FTD Mercury asks if you want to create a new customer.

Regardless of whether you add new customers from Order Entry, Point of Sale, or the FTD Mercury Main Menu, you enter information about the customer in the Customer Detail Information window.

